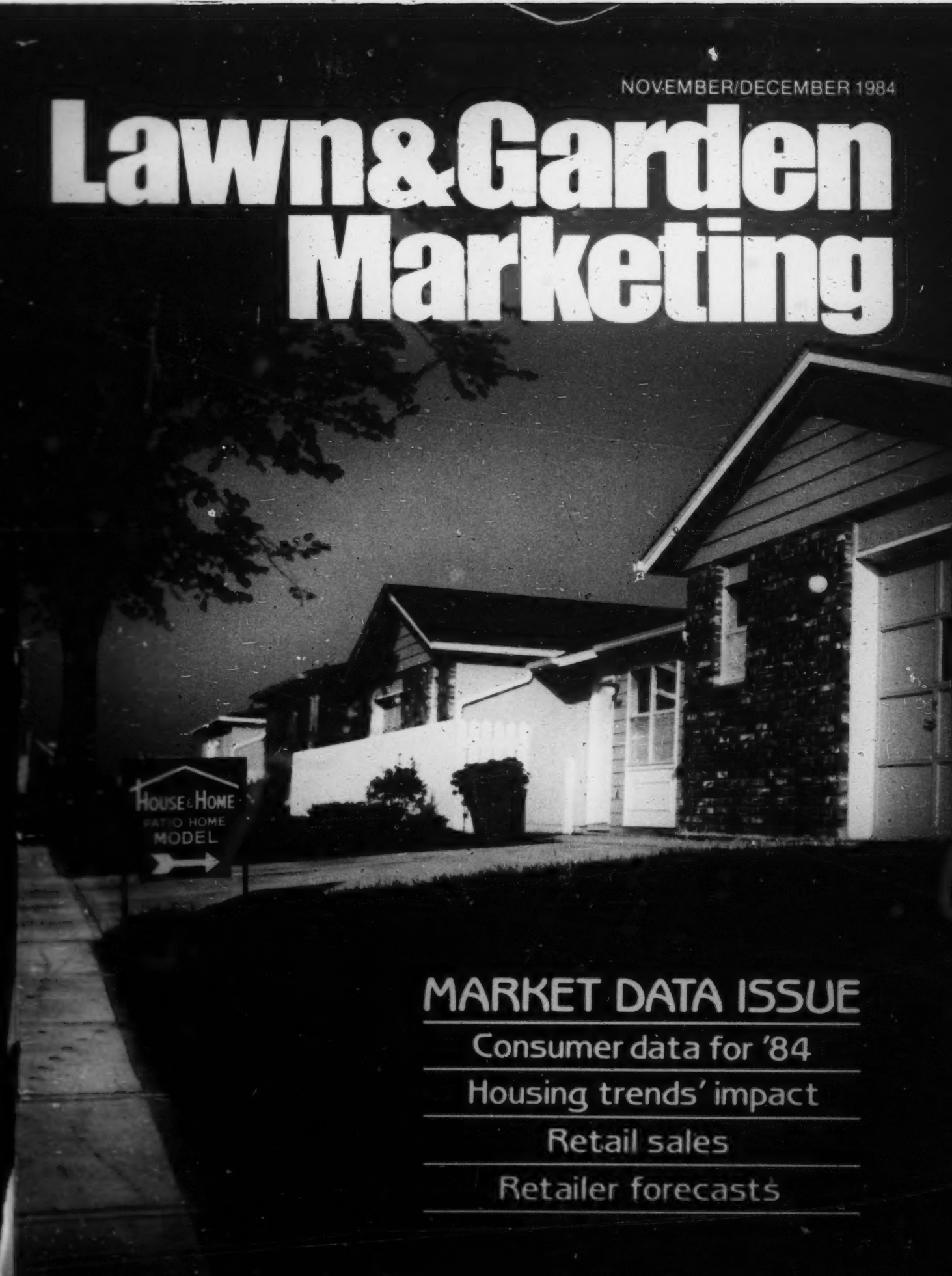
NOVEMBER/DECEMBER 1984

Lawn & Garden Marketing



MARKET DATA ISSUE

Consumer data for '84

Housing trends' impact

Retail sales

Retailer forecasts

NOV/DEC 1984 VOL. 23, No. 10 PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing

The merchandising magazine for lawn, garden and leisure living products.

4 Cover Story: Flower and container gardening activities are playing an increasingly important role in the marketplace. Data on these and other activities are reported.

49 Knowing the Market: Knowing the consumer was a key theme for the Executive Forum in Chicago. Published market research reports and strategies were discussed.

4 New Gallup data. Market data issue leads off with latest Gallup results showing consumers bought 21 percent more in 1984. Other market data articles that appear are:

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Retailers report on purchases, AAN survey results, with related **GCA members give delivery-service data,** page 44.

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Coming in January: Major distributor provides computer hardware, software to dealer network • What warehouse and superstore retailers offer the consumer, how lawn and garden fits into their plans • Relandscaping, a new look at valuable properties that have outgrown landscaping • ABCs of Mulches.

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New Gallup Data

Consumers buy 21 percent more in '84

The annual study by Gardens for All and Gallup shows six of seven product categories increased substantially.

Dollar volume that consumers spent for lawn and garden products jumped 21 percent this year from 1983. Leading all other categories in percent of increase and in dollar volume was the category described as "Landscaping, Tree Care, Shrub Care and Ornamentals." With an increase of 28 percent, this category even surpassed the amount spent on lawn care products, which reached $4.4 billion.

Gallup survey questions were phrased to the public to reflect retail sales volume, not expenditures for services by lawn care operators or other contract service operators.

The sales curve did not show any increase only in vegetable gardening. Preliminary data, according to Bruce Butterfield, research director for Gardens for All, indicated the '84 dollar volume for this category to be about $1.8 billion, not much change from '83.

In the Midwest, the incidence of gardening declined and vegetable activities were lower than normal, according to GFA. Studies for **LGM's** Product Movement Report, published in August, showed products associated with vegetable gardening were also down at the retail level. A prolonged cool, wet spring delayed and in some cases eliminated home vegetable gardening in the Midwest where this activity is usually strongest.

In 1982, 58 percent of the households produced vegetables, and in '83, 53 percent produced vegetables in the Midwest, GFA data show. Vegetable gardening "held up" in the East and the South, but it declined slightly in the West, said Butterfield.

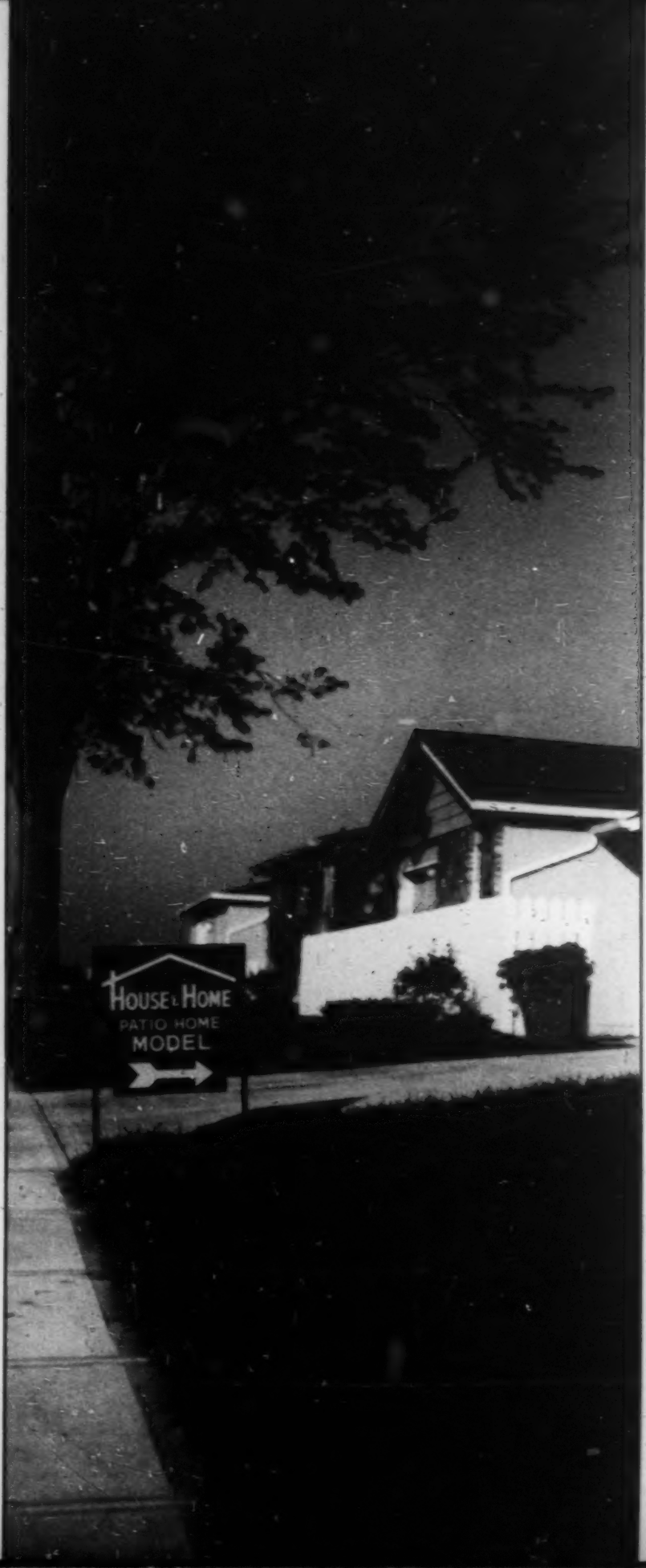
GFA's Scott analyzes data

Gardens for All's new president, Charles Scott, said of the recent data, "Gardening has clearly become part of the values of American life and is reflected in the numbers

Retail sales: 1983 and 1984

Activity:	Retail Sales 1983 ($ Billions)	Retail Sales 1984 ($ Billions)	'83-'84 % Change
Lawn Care	3.6	4.4	+22
Landscaping, Tree Care Shrub Care, Ornamentals	3.5	4.5	+28
Flower Gardening	1.8	2.1	+17
Vegetable Gardening	1.8	1.8* (est.)	0
Indoor Houseplants	.7	.9	+28
Insect Controls	.7	1	+42
Fruit Trees/Berries	.5	.6	+21
TOTAL	$12.6	$15.3	+21

Source: Gardens for All/Gallup



More flowers for more homes, even where space is limited, is the trend. Container gardening is on the increase.

of households involved in some form of the activity year round."

Scott, who recently joined Gardens for All from his former administrative posts with The National Audubon Society and The Nature Conservancy said, "We are talking about a significant portion of the American population whose lives are enriched through a garden in the backyard—over 90 million Americans are actively benefiting from home or community vegetable and fruit gardening."

Scott continued, "Food gardening took a slight dip in 1984 showing that those who did garden as a fad or only for economic reasons seemed to have dropped out. Those 34 million American households (getting) into food gardening are doing so for fresh vegetables, better tasting quality food, and better nutrition and health," he said. "Gardening can be easy, it's healthy, it's tangible, and it's enjoyable—these are some of the reasons why many American households have established gardening as part of our way of life."

Trends emerge

Since the annual study began, the following trends have emerged:

- the incidence of vegetable gardening by Americans has averaged 44 percent annually;
- the Midwest has consistently ranked as the nation's No. 1 gardening region;
- the popularity of gardening has been greater in rural areas than in small towns, suburbs or cities;
- the tomato ranks as the most popular vegetable grown by home gardeners;
- and food gardening has had a greater following among married households and people 50 years of age or older.

The annual survey has seen trends change in reasons why people gar-

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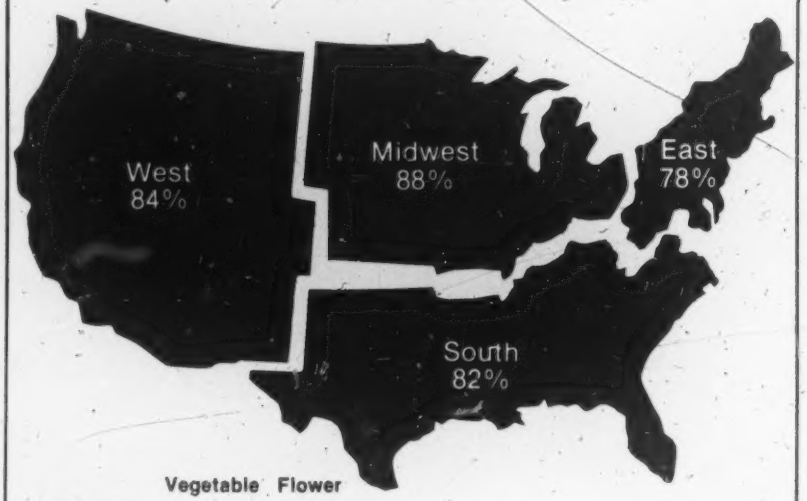
Percentage of all households in lawn or garden activity



	Vegetable	Flower
Midwest	31%	29%
South	26%	26%
East	26%	25%
West	17%	20%

Source: Gardens for All/Gallup

Trendline of gardening activities

(% of all U.S. households involved)

Activity:	1981 %	1982 %	1983 %	1984 %	1983-1984 % Point Change
Lawn Care	65	63	63	63	0
Flower Gardening	47	50	47	47	0
Indoor Houseplants	51	48	43	46	+3
Vegetable Gardening	47	46	42	40	−2
Shrub Care	43	42	35	36	+1
Insect Control	NA	39	32	38	+6
Pruning	NA	34	29	32	+3
Tree Care	NA	30	25	26	+1
Landscaping	NA	26	23	25	+2
Fruit Trees	19	22	20	18	−2
Raising Transplants	NA	18	15	17	+2
Growing Berries	11	13	12	11	−1
Edible Landscaping	8	17	11	11	0
Ornamental Gardening	7	10	7	9	+2
Nut Trees	5	7	5	4	−1

Note: Totals add to more than 100% due to multiple responses.
Source: Gardens for All/Gallup

den. In '84, the No. 1 reason American households grew food was for fresh vegetables and better tasting, more nutritious food.

Overall, vegetable gardening in America's backyards and community gardens was down 1 million households from '83 to 34 million (or 40 percent of households). The number of households growing a small amount of vegetables and fruits in containers, border plantings, on roof tops and patios increased to 10 million in '84.

83 percent of households involved

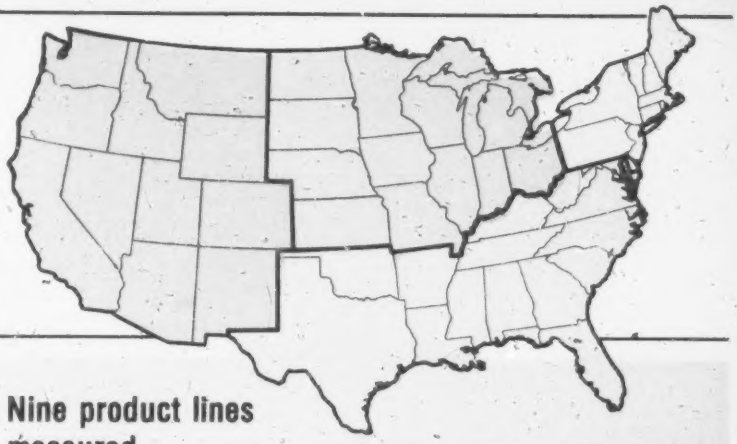
The data showed that eight out of 10 (or 83 percent of American households) were involved in at least one form of indoor or outdoor gardening.

Gardening, in its broadest sense, ranked as the No. 1 outdoor leisure activity of U.S. households again this year, more popular than golf, jogging, biking, tennis and swimming. The most popular gardening activity was flower gardening with 40 million (or 47 percent) involved.

A projection based on data from the survey showed consumer expenditures for insect control at $1 billion this year. Butterfield said that this amount could include electronic as well as chemical controls of insects. The percentage of households involved in insect control activities went from 39 percent in '82 to 32 percent in '83 and back up to 38 percent this year.

Gardens for All has sponsored and the Gallup Organization has conducted the national gardening survey annually since 1971. Gardens for All, The National Association for Gardening, is a 250,000 member-supported, non-profit organization, based in Burlington, VT. The national survey is conducted in the months of July and August by The Gallup Organization of Princeton, NJ. □

Product Movement Report summer, 1984



■Retail sales in nine product lines increased during summer 1984 compared to summer 1983 levels, according to a survey conducted by **Lawn & Garden Marketing.**

Replacement parts continue to be strong sellers with 69.2 percent of the responding retailers reporting increased sales. Almost 45 percent of the retailers indicated increases of at least 15 percent.

Walk-behind mowers also appeared to sell well during the 1984 summer season. Nationally, 38.7 percent of the retailers reported increased sales. Only in the North Central region did more retailers report decreased sales than increased sales. In that region 23.8 percent reported decreased sales while 20.6 percent showed increases.

As in the other product lines, chemicals, herbicides and insecticides all had more retailers reporting increases than decreases. The most dramatic increase in chemicals was in the South where 100 percent of the responding retailers reported sales were up or about the same. The West had the worst report with only 22.2 percent reporting increases and the same percentage reporting decreases. The overall results were almost unchanged from summer 1983.

Most regions showed slightly higher percentages of retailers with higher sales of herbicides, but the percentages nearly doubled in the North Central and West. The percentage reporting decreased sales also dropped from 21.0 percent in the Northeast to 4.6 percent. Overall, the percentage reporting lower herbicide sales dropped from 13.9 percent to 8.2 percent.

Insecticides also had more retailers reporting increases. The percentages were up from 40.4 percent reporting increases in 1983 to 49.2 percent in 1984. The North Central region did not follow the trend, dropping from 41.9 percent with increases to 40 percent this season. All regions except the South had a smaller percentage reporting decreases.

The Northeast reversed the nationwide sales trends for watering equipment. Nationally, 31.8 percent reported increases and 16.9 percent decreases; the Northeast had 16.1 percent with increases and 32.3 percent with decreases.

The North Central region reported only small sales gains in 1983. This trend continued during the spring sales season. The North Central region tended to be slightly below the national figures. The same appears to be true for the summer season. Reported increases were slightly below the percentages for the nation except for walk-behind mowers for which sales increases were much lower and reported decreases outweighed increases. □

Nine product lines measured

		TOTAL %	NORTHEAST %	N. CENTRAL %	SOUTH %	WEST %
Walk-behind mowers	Up	38.7	52.0	20.6	47.4	58.3
	Same	36.7	32.0	42.9	39.5	20.9
	Down	15.3	8.0	23.8	5.2	16.6
Riding mowers/ lawn tractors	Up	39.4	43.8	37.3	45.5	33.3
	Same	21.2	18.6	23.5	18.2	20.0
	Down	26.9	12.6	29.4	31.8	26.7
Spin trimmers	Up	35.3	36.0	31.8	39.5	37.5
	Same	34.0	36.0	31.8	36.7	33.3
	Down	18.0	8.0	25.4	10.6	20.9
Replacement parts	Up	69.2	75.0	64.7	59.1	93.3
	Same	25.0	18.7	29.4	31.8	6.7
	Down	3.9	6.3	5.9	.....	.....
Chemicals	Up	34.8	33.3	25.0	50.0	22.2
	Same	50.0	33.3	58.3	50.0	55.6
	Down	10.9	11.1	16.7	.....	22.2
Herbicides	Up	37.7	36.4	26.7	38.8	66.7
	Same	44.3	45.4	40.0	50.0	33.3
	Down	8.2	4.6	20.0	5.6	.....
Insecticides	Up	49.2	45.5	40.0	55.7	66.7
	Same	29.5	27.3	33.3	27.8	33.3
	Down	11.5	13.6	13.4	11.2	.....
Garden tools	Up	26.2	31.9	26.7	22.4	16.7
	Same	54.1	40.7	60.0	60.9	66.7
	Down	11.5	9.2	13.3	16.7	.....
Watering equipment	Up	31.8	16.1	40.7	35.3	40.0
	Same	39.2	32.3	33.4	47.1	46.6
	Down	16.9	32.3	7.4	11.8	13.4

Because of multiple responses, percentages do not add up to 100%

Current inventory of walk-behind mowers (median no. of units per store)	17	14	17	13	18

**The mass merchandisers' and hardware/home centers' questionnaire asked for information on horticultural chemicals. The questionnaire to garden centers broke down horticultural chemicals into herbicides and insecticides.*

Nine product lines sold through four key classes of retailers were measured by **LGM** for this survey.

'82 Census data

EQUIPMENT SHIPMENTS AT $2.38 BILLION

■Preliminary data developed by the 1982 Census of Manufactures may come as a surprise to some industry observers. This is due to some sharp declines from 1977 unit volumes in some product categories.

continued on page 18

Lawn and garden equipment
(Industry 3524)

	1982 [1]Product shipments		1977 [1]Product shipments	
	[2]Quantity (thousands)	Value (million dollars)	[2]Quantity (thousands)	Value (million dollars)
Consumer nonriding lawn, garden, and snow equipment:				
As reported in the census of manufactures	(X)	1,167.5	(X)	841.2
As reported in the Current Industrial Report MA-35A, Farm Machinery and Lawn and Garden Equipment	(X)	1,112.8	(X)	(3)
Lawnmowers:				
Reel, push type, nonpowered	39.9	9.2	121.5	3.1
Reel, push type, gasoline engine powered			35.7	6.0
Rotary, push type, gasoline engine powered	3,200.5	377.3	3,080.5	249.7
Rotary, self-propelled, gasoline engine powered	1,489.4	266.3	996.0	132.1
Electric, all types, including battery powered			157.5	15.7
Rotary garden (motor) tillers	545.3	188.6	[4]499.0	[4]115.0
Two-wheel tractors, walking type (except rotary tillers)	11.8	8.8	(5)	(5)
Snow throwers (snow blower) (except attachment type):				
Single stage	150.1	22.3	244.2	37.9
Dual stage	88.6	47.8	146.1	50.9
Powered lawn edgers/trimmers:				
Fixed blade, gas	184.3	22.6	2,208.4	57.6
Fixed blade, electric	440.1	16.7		
Other than fixed blades	2,287.7	82.9	6,023.4	112.9
Shredders and shredder-grinders	16.3	4.1	16.1	3.4
Powered hedge trimmers	(6)	(6)	(S)	520.6
Yard vacuums and blowers	525.9	23.4	39.8	11.6
Lawn sweepers, push type and powered (except attachment type)	94.5	8.0	89.5	5.0
Other consumer nonriding lawn, garden, and snow equipment	[8]1,345.7	[8]34.8	(X)	[r]19.8
Parts and attachments for consumer nonriding lawn, garden, and snow equipment:				
As reported in the census of manufactures	(X)	145.5	(X)	103.2
As reported in the Current Industrial Report MA-35A, Farm Machinery and Lawn and Garden Equipment	(X)	141.0	(X)	(3)
Parts	(X)	[7]121.0	(X)	70.6
Attachments	1,107.4	20.0	(X)	32.6
Consumer riding lawn, garden, and snow equipment:				
As reported in the census of manufactures	(X)	765.2	(X)	577.4
As reported in the Current Industrial Report MA-35A, Farm Machinery and Lawn and Garden Equipment[9]	(X)	742.6	(X)	(3)
Lawn tractors and riding mowers:				
Front engine:				
Less than 8.0 hp	(6)	(6)		
8.0 hp to 9.9 hp	[8]139.8	[8]82.6	460.4	194.9
10.0 hp or more	252.2	255.3		
Rear engine:				
Less than 6.0 hp	22.9	12.8	119.3	43.8
6.0 hp to 7.9 hp	24.5	14.2		
8.0 hp to 9.9 hp	133.5	98.2	140.3	64.8
10.0 hp or more	59.2	52.6		
Garden tractors:				
Less than 10.0 hp	25.6	45.3	13.1	12.1
10.0 hp to 13.9 hp			70.0	88.5
14.0 hp to 15.9 hp	14.9	37.2	33.1	51.8
16.0 to 19.9 hp	(10)	(10)	68.6	105.7
20.0 hp or more	(10)	(10)	[10]107.1	15.7
Other consumer riding lawn, garden, and snow equipment	[10]66.3	[10]44.2		
Lawn and garden equipment, n.s.k., typically for establishments with 20 employees or more (see note)	(X)	19.5	(X)	17.0
Lawn and garden equipment, n.s.k., typically for establishments with less than 20 employees (see note)	(X)	33.7	(X)	9.1

The following abbreviations and symbols are used in the tables in this publication:

(S) Withheld because estimate did not meet publication standards on the basis of either the response rate or a consistency review.
(X) Not applicable.
n.s.k. Not specified by kind.
r Revised.

[1]Data reported by all producers, not just those with shipments of $100,000 or more.
[2]For some establishments, data have been estimated from central unit values which are based on quantity-value relationships of reported data. The following symbols are used when percentage of each quantity figure estimated in this manner equals or exceeds 10 percent of published figure: *10 to 19 percent estimated; **20 to 29 percent estimated. If 30 percent or more is estimated, figure is replaced by (S).
[3]For 1977, data was collected only in the census of manufactures.
[4]Comparable data for 1977 from CIR MA-35A for rotary garden (motor) tillers are 425,496 units valued at $65.8 million for under six engine horsepower and 110,899 units valued at $53.1 million for six engine horsepower or more.
[5]For 1977, category totals were combined to avoid disclosing data for individual companies. Comparable data for 1977 from CIR MA-35A for two-wheel, walking-type tractors has been combined with attachments for garden tractors.
[6]For 1982, category totals are combined to avoid disclosing data for individual companies.
[7]Only replacement parts are collected on the current industrial report. This is assumed to be the major reason for lower total values for parts and attachments than those shown for census data.
[8]See 1976 CIR MA-35A for more product detail.
[9]For 1982, category totals are combined to avoid disclosing data for individual companies.
[10]For 1982, category totals are combined to avoid disclosing data for individual companies.

Source: 1982 Preliminary Report of Census of Manufactures; U.S. Dept. of Commerce; Bureau of the Census

Census continued from page 16

Results, excluding those of riding equipment, parts and attachments are reported in the table.

The Census of Manufactures, by the Bureau of the Census, is tabulated every five years. The figures reflect only quantities and values of domestic product shipments and dollar figures at prices current for that year. They do not take into account the inflation factor, nor do they report imported equipment and accessories.

Two categories show increases

Substantial increases in product shipments were seen in the categories of yard vacuums and blowers and snow-thrower attachments.

Yard vacuums and blowers increased in products shipped from 39,800 in '77 to 525,900 in '82; although the value of these goods shipped increased only slightly more than 100 percent, the quantities increased more than 1,200 percent over '77 figures.

Snow-thrower attachments marked a substantial increase of 1,200 percent also, increasing from 19,700 in '77 to 270,300 product shipments in '82.

Decreases shown in some categories

Those categories with substantial decreases, according to census information, include reel push-type non-powered and gasoline-powered lawn mowers, single- and dual-stage snow throwers, lawn edgers/trimmers, rear engine riding mowers of less than 6.0 hp and garden tractors of less than 16 hp.

The combined figures from the two categories of reel push-type non-powered and gasoline-powered lawn mowers indicate a substantial decrease in product shipments from 157,200 in '77 to 39,900 in '82, a 74 percent decrease.

Single-stage snow throwers dropped from 244,200 in '77 to 150,100 in '82, a 38 percent decrease; dual-stage dropped from 146,100 in '77 to 88,600 in '82, a 39 percent decrease.

The whole category of lawn edgers/trimmers, including fixed blade electric and gasoline-powered types and those other than fixed blade, experienced a decline of 64 percent from 8.2 million in '77 to 2.9 million in '82.

Rear engine riding mowers of less than 6.0 hp showed a substantial 80 percent decrease in products shipped from 119,300 in '77 to 22,900 in '82, (though rear engine riding mowers of greater horsepower increased from 140,300 to 217,200, a 54 percent increase.)

And garden tractors of less than 16 hp decreased 65 percent in product shipments from 116,200 in '77 to 40,500 in '82.

Fewer employees

According to Census data, the lawn and garden equipment industry recorded employment of 17,800, a decrease of 9 percent from '77 (and 2 percent from 1981). Wisconsin, Illinois, Mississippi and Ohio accounted for about 46 percent of the industry's '82 employment, the same as in '77.

Total value of shipments was $2.4 billion; 91 percent represents products primary to the industry; the remaining 9 percent is secondary products and miscellaneous receipts. □

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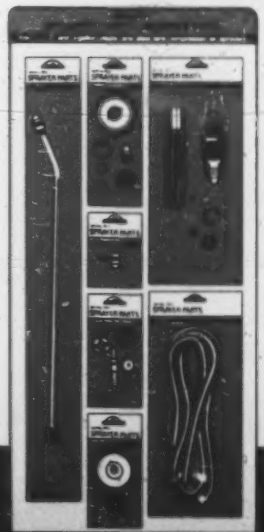

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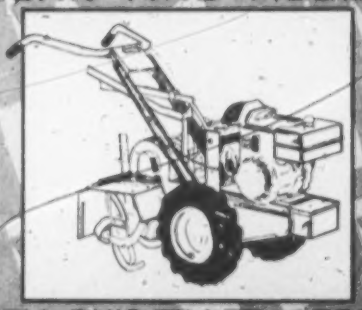

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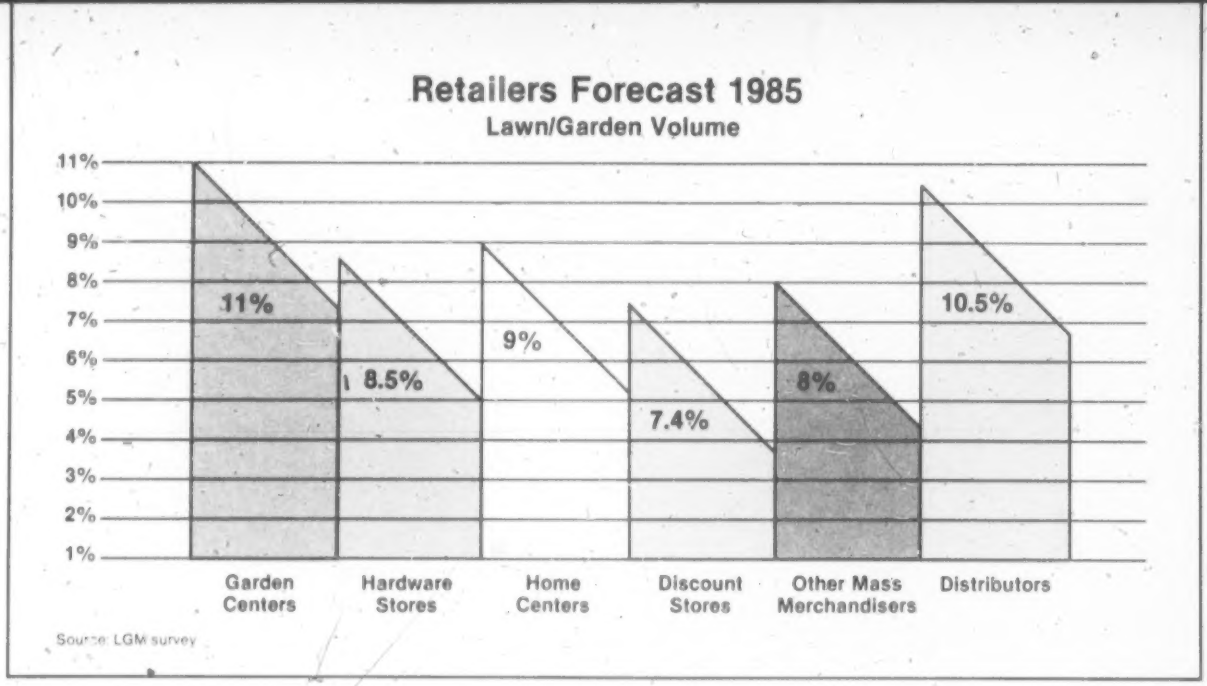

Retailers see big '85 increase

Patio: price sensitive

■Despite Industry predictions, patio sales could slow if prices rise. According to the August '84 issue of *Chain Store Age*, data compiled by CSA/Leo Shapiro & Associates indicate that higher prices of patio furniture may deter the shopper, who is profiled as "an older customer who is planning for or just beginning retirement."

Says CSA, "In this year's study, 41.3 percent of those who have or are planning to buy patio furniture are 45 years old or older vs. 36.3 percent who were that old in the '83 study. Additionally, 39 percent are between the ages of 30 and 44 compared with 41.7 percent in 1983. One out of two have family incomes below $30,000, similar to last year's survey.

"Over the past 12 months, this older customer has become increasingly concerned about patio furniture prices. Discount or low price was the No. 1 factor influencing 37.9 percent of this year's shoppers. Last year, it was mentioned by 27.2 percent of those polled. (Selection and quality were the second and third motivators each year.) Moreover, one out of every two polled this year bought the merchandise on sale." -□

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■Garden centers and wholesale distributors of lawn and garden products foresee a significant increase in sales volume, according to the results from an **LGM** survey conducted in early September.

Garden centers, with a forecast of an 11 percent increase in overall product mix, were the most optimistic of the five classes of retailers surveyed, though other hardlines retailers exceeded garden centers in their expectations of increases in many of the product categories.

In nursery stock alone, garden centers predict a 20 percent increase, in comparison to discount stores' 8 percent, home centers' 5 percent, hardware stores' 4 percent and other mass merchandisers' 3 percent.

Volume retailers were especially optimistic of sales of garden tools, with home centers forecasting a 15 percent increase, hardware stores 14 percent, other mass merchandisers 11 percent, discount stores 8 percent and garden centers 4 percent.

Retailers predict substantial increases in outdoor patio sales, with discount stores anticipating a 12 percent increase, other mass merchandisers 8 percent, garden centers and hardware stores 7 percent and home centers 4 percent.

All retailers were surprisingly bullish about expected increases in sales of lawn fertilizer, despite continued reports of heavy inroads from the lawn care operator sector of the business.

In lawn fertilizer sales, other mass merchandisers predict a 12 percent increase, home centers 11 percent, garden centers 10 percent and discount stores 9 percent. In specialty fertilizer sales, garden centers and other mass merchandisers predict a 10 percent increase, hardware stores 6 percent, and home centers and discount stores 5 percent.

Other expected increases from that survey follow:

Cutting tools. Expected increases are: hardware stores, 10 percent; home centers and other mass merchandisers, 8 percent; discount stores, 7 percent; and garden centers, 4 percent.

D I Y irrigation. Expected increases are: other mass merchandisers, 6 percent; hardware stores, 4 percent; garden centers, 3 percent; and home centers, 1 percent.

Horticulture chemicals. Expected increases are: garden centers, 9 percent; discount stores, 8 percent; home centers and other mass merchandisers, 5 percent; and hardware

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the power equipment industry continually addressed health and safety issues. A major function of the OPEI is the continuing development of safety standards for all outdoor power equipment products. New products are added to the list each year along with revisions of existing standards as the state of the art changes. I have no idea if the federal government will again choose to be involved in our industry as directly as it was with the CPSC. However, we will continue to address environmental issues, such as noise abatement, air pollution and, certainly, safety. The OPEI has standing committees addressing technical and marketing issues. When our direction is determined, the OPEI works with the appropriate government agency to present a workable solution that will permit the industry to provide effective products while addressing the specific environmental or consumer issue. This is an ongoing process and one of the major functions of the OPEI.

Burns: In your opinion, where will the OPEI focus its activities in the next five years: marketing activities, governmental activities, increasing exports, expanding the International Lawn, Garden & Power Equipment Expo, other?

Reid: The OPEI activities of the next five years will generally follow the future plans list which I mentioned earlier. Undoubtedly, we will continue to be deeply involved in governmental activities and in the expansion of our International Lawn, Garden & Equipment Expo.

Burns: What can be done to make the marketing of outdoor power equipment products more profitable for all segments of the industry—suppliers and retailers?

Reid: The most important single factor for making outdoor power equipment products more profitable is rapid and positive product development and innovation. Many of our major product lines have reached the "mature" stage of the product life cycle. Most sales are for replacement purposes. New products that perform better, are more convenient or do a new task accelerate replacement and provide market expansion. Certainly it helps to market better. We must provide sales and service information to retailers, improve the flow of highly seasonal products, and implement other recognized improvements in business management. But the greatest strides forward for the power equipment industry have always been new and better ways of applying a small, portable power source to a job done around the lawn and garden. The world is developing new technology very rapidly. We must make sure that our industry applies this technology well. □

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stores, 2 percent.

Indoor plants. Expected increases are: garden centers, 10 percent; discount stores, 8 percent; other mass merchandisers, 6 percent; and hardware stores and home centers, 2 percent.

Power equipment. Expected increases are: hardware stores and home centers, 12 percent; other mass merchandisers, 10 percent; discount stores, 7 percent; and garden centers, 1 percent.

Power parts. Expected increases are: home centers, 7 percent; discount and hardware stores, 6 percent; other mass merchandisers, 3 percent; and garden centers, 1 percent.

Sprayers. Expected increases are: other mass merchandisers, 8 percent; home centers and discount stores, 7 percent; hardware stores, 6 percent; and garden centers, 4 percent.

Trimmers/blowers. Expected increases are: home centers, 9 percent; hardware stores, 7 percent; discount stores, 5 percent; other mass merchandisers, 4 percent; and garden centers, 1 percent.

Watering products. Expected increases are: home centers, 9 percent; discount and hardware stores, 8 percent; other mass merchandisers, 6 percent; and garden centers, 4 percent.

Also, garden centers, who alone were surveyed on expected increases in landscape services, predicted a 15 percent increase in that category. □

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